**Touch Point #1 – “I am greeted at the lab”**

**MOA/Lab Assistant/Lab Tech Checklist**

**Self-Assessment Checklist**

Name:

|  |  |  |  |
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| **A** | **S** | **N** | **WARM, GENUINE WELCOME** |
|  |  |  | Smile and make eye contact |
|  |  |  | Don’t look busy, distracted. |
|  |  |  | Adopt an open, attentive posture. |
|  |  |  | Apologize for inconvenience (even when it’s not your fault)  |
|  |  |  | Match the patient’s energy when possible. Be cheerful. |
|  |  |  | Call the patient by their first name and last initial.  |
|  |  |  | **PATIENT IS WAITING, BUT YOU ARE HELPING SOMEONE ELSE** |
|  |  |  | If you are finishing up something, tell patient you will be right with them. Stay efficient and calm during moments of high traffic. |
|  |  |  | Don’t spend too much time ‘socializing’ with patients if there is a long line. Be respectful of the other patients in line. |
|  |  |  | If you are on the phone: acknowledge patient in front of you with a smile, mouth “I’ll be right with you,” or a gesture that it will be just a moment.  |
|  |  |  | **SHOWING YOU CARE – THE HUMAN CONNECTION** |
|  |  |  | Inquire about the patient’s well-being. Be genuinely interested. |
|  |  |  | Make eye contact.  |
|  |  |  | Display empathy – acknowledge how the patient is feeling. |
|  |  |  | Never admonish a patient for being late. If possible, greet in their language |
|  |  |  | Speak to the patient not just the interpreter. |
|  |  |  | If patient needs help, leave desk (if possible) and offer assistance |
|  |  |  | Gauge emotional state and what the patient needs. Need sympathy? Need quick and efficient? Need to chat a little bit? |
|  |  |  | Make a personal connection via small talk: give a sincere compliment, remember a detail from their last visit, and ask a simple question about their day. |
|  |  |  | Make new patients feel welcome and special.  |
|  |  |  | **BE EAGER TO HELP** |
|  |  |  | Give patient your entire attention (no side conversations or other distractions with co-workers). |
|  |  |  | Offer patients options and empower them to participate in making choices. |
|  |  |  | If patient is dissatisfied, offer rescheduling option. |
|  |  |  | Keep patients informed of current status and next steps. |
|  |  |  | Anticipate the needs of the patient. Assist patients with wheelchairs, walkers, crutches, mobility devises (if they want assistance). |
|  |  |  | Direct patient to seating area that they will be called from – give exact directions on where to sit (not “go towards the fish tank”). |
| **A** | **S** | **N** |  |
|  |  |  | Show hospitality when possible. Offer a beverage, magazine, blanket, etc if appropriate. |
|  |  |  | **RESPECT PRIVACY** |
|  |  |  | Speak in a respectful tone and one that protects confidentiality. |
|  |  |  | Be sensitive to patient’s feelings and always maintain a professional demeanor. Don’t make a big deal out of reason for visit or other personal information that is shared.  |
|  |  |  | If other patients are “hovering,” discretely call them over and respectfully ask them to wait in a certain area, further from the desk.  |
|  |  |  | **ACKNOWLEDGE WAITING ROOM WAIT** |
|  |  |  | Explain what to expect. |
|  |  |  | Update patient on interpreter’s arrival. |
|  |  |  | Apologize for delay. Use a calming voice |
|  |  |  | Take ownership, apologize, sympathize, offer beverage. |
|  |  |  | Be sincere – acknowledge patient’s feelings. Offer patient options. |
|  |  |  | **WARM, GENUINE CLOSE** |
|  |  |  | Offer to be available to further help the patient. |
|  |  |  | Invite patient to contact you with questions at any time during visit or after (ownership). You are here to help. Give business card or your name for reference.  |
|  |  |  | Thank the patient for using HealthPartners or coming in today. |
|  |  |  | **CREATING THE HPMG EXPERIENCE** |
|  |  |  | Take ownership of the patient experience. |

**Touch Point #2: “I am welcome by the lab tech/lab assistant”**

**Role: Lab Assistant/Lab Tech**

**Self-Assessment Checklist**

Name:

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| **A** | **S** | **N** | **WARM, GENUINE WELCOME & SHOW YOU CARE** |
|  |  |  | Gentle knock before entering the phlebotomy/procedure room, wait for a response. |
|  |  |  | Smile. |
|  |  |  | Give warm/pleasant greeting; use patient’s first name; acknowledge others in the room. |
|  |  |  | Introduce self; acknowledge new patient status. |
|  |  |  | Apologize for being late. |
|  |  |  | Verify patient’s identity. |
|  |  |  | Shake hands/initiate touch *(if culturally appropriate).* |
|  |  |  | Establish and use eye contact with patient and companions/caregivers. |
|  |  |  | Sit down and face patient, not computer. |
|  |  |  | Adopt a posture that is open and inviting. |
|  |  |  | Create a personal connection: convey knowledge of patient history, greet follow-up patients like old friends, or use small talk to break the ice. |
|  |  |  | Maintain an efficient but not rushed pace. |
|  |  |  | Maintain a professional appearance (i.e. wear closed toed shoes, clean lab coats, visible nametag). |
|  |  |  | Wash hands in front of patient if possible. |
|  |  |  | **DEMONSTRATE PREPAREDNESS & ACTIVE LISTENING** |
|  |  |  | Demonstrate knowledge of lab tests ordered, reason for visit, and/or that you are familiar with what the patient has already told others. |
|  |  |  | LISTEN: don’t interrupt the patient, ask probing questions; respond empathetically; legitimize the patient’s concerns.  |
|  |  |  | Be present (nod, eye contact, face patient with open posture) |
|  |  |  | Explain what’s going to happen during the visit/procedure. |
|  |  |  | Verify identity – ask patient to state their name and date of birth.  |
|  |  |  | If patient states they have fainted give them the option of laying down for the blood draw. |
|  |  |  | Clarify requirements for collection such as fasting.  |
|  |  |  | Give patient option to reschedule if fasting is needed. |
|  |  |  | **INCORPORATE EMR INTO THE VISIT** |
|  |  |  | Wait to log on to computer until you’ve greeted the patient and made a connection  |
|  |  |  | If there is a need for clarifying orders with the provider, explain this to the patient. |

**Touch Point #3: “I am having my test/procedure done”**

**Lab Assistant/Lab Tech Checklist**

**Self-Assessment Checklist**

Name:

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| **A** | **S** | **N** | **NARRATE THE CARE & SHOW EMPATHY & RESPECT** |
|  |  |  | Narrate the care: State positive and negative findings; explain what you are doing, what’s happening to the patient’s body and why |
|  |  |  | Speak in a manner that patients can understand (i.e. use non-technical terms, speak slowly and distinctly for hard of hearing patients, summarize when necessary) |
|  |  |  | Put gloves on in front of patient |
|  |  |  | Attend to the patient’s comfort and privacy. Be in tune to the patient’s comfort level and pause as needed.  |
|  |  |  | Show empathy and caring |
|  |  |  | **ENSURE PATIENT UNDERSTANDS** |
|  |  |  | Confirm understanding and agreement with patient; address concerns or frustrations |
|  |  |  | **DECREASE ANXIETY** |
|  |  |  | Recognize if patient looks anxious. Give a reassuring touch on the arm. |
|  |  |  | Elevate your colleagues – speak highly of your team and other HPMG providers, departments, and clinics. |
|  |  |  | Identify key words that worry the patient and provide assurance when appropriate. |

**Touch Point #4: “My visit comes to an end”**

**Lab Assistant/Lab Tech Checklist**

**Self-Assessment Checklist**

Name:

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| --- | --- | --- | --- |
| **A** | **S** | **N** | **IDENTIFY NEXT STEPS, WHO TO CONTACT, & INVESTMENT IN A POSITIVE OUTCOME** |
|  |  |  | Ensure the patient understands and agrees with the plan.  |
|  |  |  | Offer to sign patient up for on-line services. |
|  |  |  | Remain with the patient has assured you that s/he has no further questions or concerns.  |
|  |  |  | Verbalize your team approach. Hand-off your plan in front of patients if possible.  |
|  |  |  | Escort patient to next area (if possible) or make sure patient is clear on how to get there. |
|  |  |  | Provide patient Lab Information Card. |
|  |  |  | Be genuinely appreciative.  |
|  |  |  | **Graceful Exit & WARM, GENUINE CLOSE** |
|  |  |  | Deliver a reassuring smile |
|  |  |  | Shake hands *(if culturally appropriate)*  |
|  |  |  | Thank patient for coming and give a warm goodbye |
|  |  |  | Invite follow-up business |
|  |  |  | **CREATING THE HPMG EXPERIENCE** |
|  |  |  | Take ownership of the patient experience |

**What work practices are you changing to make more meaningful Patient Laboratory Experiences?**

**What exceptional laboratory patient experience have you had? *Please share an example***

**If a patient laboratory experience did not go well, what could you have done better? *Please share an example***